

Key Account Intelligence

Our Solution and Capabilities

2025

Key Business Objectives

Decision-makers across our clientele require account-based marketing solutions for tailored focus on penetration, new opportunities, and rapport building



- How can we grow the account? What's the size of the opportunity?
- How do I acquire new high potential accounts?
- Who are the budget-holding decision makers? Who are the main influencers?
- Can we identify all decision makers to whom we can sell?
- Can we improve our conversion rates and deal size?
- Is there a way to track important company or people updates on an ongoing basis? Can we capitalize more quickly on these opportunities?
- Can we improve our rapport with existing contacts?
- How can I future-proof the account against people movements or promotions?

Components

Our KAI solution emphasizes on continuity of support throughout clients' account marketing roadmap, blending in-depth insights and frequent actionable updates for quick decision making

	1. Intelligence Reports	KAI Components	2. Action Plans		
COMPONENT DETAILS	In-depth intelligence report providing a 360-degree view of the key accounts, their structure, opportunity size, and key stakeholders		Clear fortnightly action plans for sales and marketing decision makers to improve stakeholder engagement and tap into new opportunities		
KEY HIGHLIGHT	Delivers insights critical for clients to define an account-specific or stakeholder-specific marketing and sales strategy		Dedicated Key Account Analyst to track all relevant updates and filter client-specific details relevant for the action plan		
METHODOLOGY	Account and stakeholder information gathered using public sources and paid subscription databases to build a comprehensive view		Powered by Cognition's Media SIGNALS – a searchable AI + HI platform configured to each client's custom requirements		
RECOMMENDED DUTPUT FREQUENCY	Quarterly		Fortnightly / Bi-Weekly		

1. Intelligence Reports

IRs provide a comprehensive yet targeted view into the account's attractiveness, structure, key stakeholders, helping clients easily navigate through and mine accounts of all sizes



Key Account Boilerplate

High level overview of the key metrics



Business Structure

Breakdown of how the company is organised



Organogram

Organization structure - relationships between different stakeholders, departments/ divisions, and roles across the hierarchy within the account



Sphere of Influence

A sales and marketing roadmap, with the main decision maker at the centre



Financial Performance

In-depth financial/performance summary of the key accounts and a honed-in view of the relevant divisions

- Headquarters
- Services
- No. of Employees
- Turnover (USD mm), %
 Growth and Profit Margin
- Regional Presence and Target Markets

- Business structure
- Product categories
- Brands
- Decision-making unit (DMU) structure

- Board of Directors
- Executive Management Team
- Stakeholders in the Decision-Making Unit (DMU)

- Levels of relationships that exist between primary contact and other key stakeholders
- Financial Statement
- Key Financial Performance
- Division-level Financial Performance



2. Action Plans

Focus of the action plans is to keep the sales and marketing decision makers updated and suggest ideas for tailored communication, outreach initiation, and exploration of new focus areas



Strategic Company Updates

M&A/JVs/Partnership, Product/Service Launch, Strategic Investments, Financial Results, Organisation Structure Changes, etc.



Key Stakeholder People Movements

New Hires, Promotions, Internal Movement, Resignations, Expansion in Roles and Responsibilities, etc.



Social Media Monitoring

Announcements, Event Participation, Media Mentions, Awards and Recognition, Stakeholder Social Media Activity, etc.



KEY

UPDATES

Exploration of new focus areas, stakeholder identification within new entities, etc.

Tailored communication and rapport building ideas, succession planning, etc.

Tailored communication and rapport building ideas, topics to initiate communication, etc.

Action Plan Approach

Client-specific
Custom Input Feed

Focus areas, stakeholders, keywords, taxonomy, etc.



Daily tracking of relevant updates by Cognition SIGNALS AI-engine



Strategic Company Updates; People Movements; Social Media Monitoring





Dedicated Key Account Analyst as a 'Human Intelligence' layer to filter the most relevant updates, and generate actionable insights Fortnightly Action Plan for Sales and Marketing Decision Makers



Analytical Approach and Research Methodology

KAI solution is designed to address all account-based marketing priorities of clients, defining a clear roadmap, cutting through account information overload to deliver tailored insights

Stakeholder Mapping for Targeted Outreach:

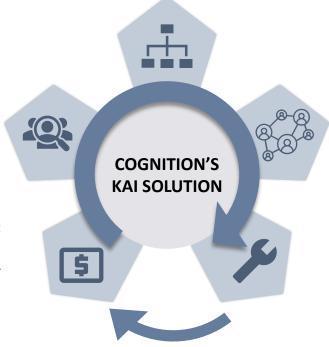
Stakeholders mapping by relevant function, roles/responsibilities, decision-making hierarchy, service line, domain and expertise, etc., to identify high-value opportunities

Target Universe Expansion:

Comprehensive account scan to identify all key decision-makers, budget holders, budget influencers and users of client service/solution

Opportunity Size Assessment:

Assessment of commercial potential of each key account (existing or prospect)



Regular Client Feedback Loop to Iterate and Optimize Focus Areas and Approach

Opportunity-specific Sales Roadmap for Deepening Relationships:

Detailed connections and influence map for target key stakeholders, enabling effective rapport building to deepen ties within decisionmaking circles

Action Plan based on Continuous Monitoring and Updates:

Account monitoring at company and stakeholder level to ensure all new opportunities are identified and timely action plan is provided

Measurable Outcomes

IRs and APs provide certain 'Growth Levers' and 'Retention Levers', which generate new revenue opportunities and improve probability of retaining existing revenue, respectively

GROWTH LEVERS

Growth of account revenue by identifying new opportunities

- Identifying new decision-makers and influencers, and the most efficient ways to engage with them
- Identifying new prospects from company updates (M&A/ JV/ partnerships, investments, etc.)
- Identifying new prospects from people movement (new hires, existing contacts moving to new companies or new roles, etc.)

RETENTION LEVERS

Revenue retention by increasing renewal rates

- Identifying a broader set of relevant influencers and end-users, and ways to increase engagement levels with them
- Identifying potential successors (to decisionmaking roles) at a very early stage
- Enabling effective rapport building

These measurable outcomes can be used to assess the impact of IRs and APs on growth of account revenue



DELIVERED

INSIGHTS

Sample Delivery Schedule

A flexible and hyper-customized engagement model allowing each client to select the number of accounts (for IRs vs. APs) as well as refresh frequencies

Sample Delivery Schedule for 25 Key Accounts

Accounts Coverage Option	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Accounts 1-5	IR	2APs	2APs	QU IR + 2APs	2APs	2APs	QU IR + 2APs	2APs	2APs	QU IR + 2APs	2APs	2APs
Accounts 6-15	-	IR	2APs	2APs	QU IR + 2APs	2APs	2APs	QU IR + 2APs	2APs	2APs	QU IR + 2APs	2APs
Accounts 16-25	-	-	IR	2APs	2APs	QU IR + 2APs	2APs	2APs	QU IR + 2APs	2APs	2APs	QU IR + 2APs

^{*}Intelligence Report (IR); Action Plan (AP), Quarterly Update (QU)

Above example showcases a tentative schedule, and custom requirements can be accommodated as well.

Depending on the exact requirements, the total cost of engagement can be finalized.



THANK YOU

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